Project Management Best Practices and Producing Quality Deliverables:
Monitoring Reports

Hosted by the Texas Department of Information Resources (DIR)

Monday, March 3, 2014

2:00 – 3:00 via Webinar

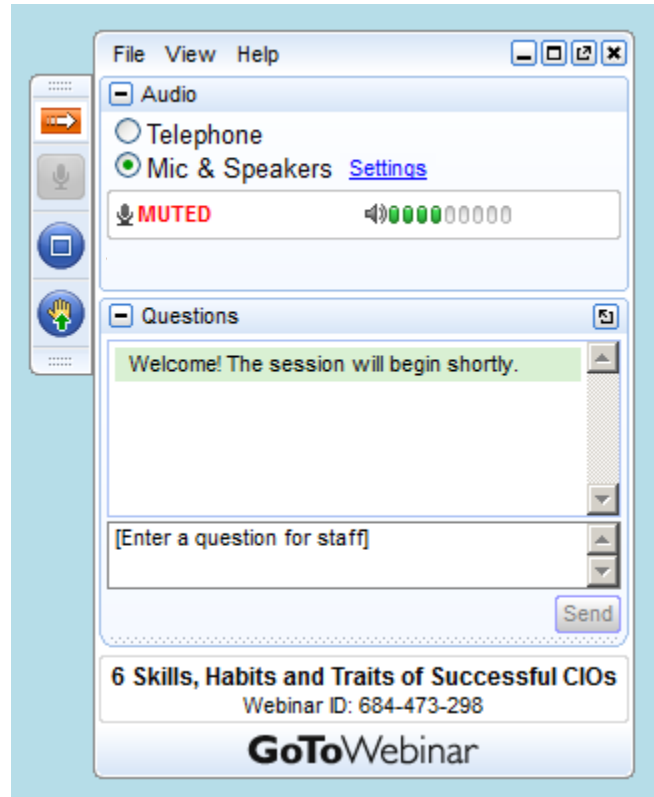# GoToWebinar® Attendee Controls

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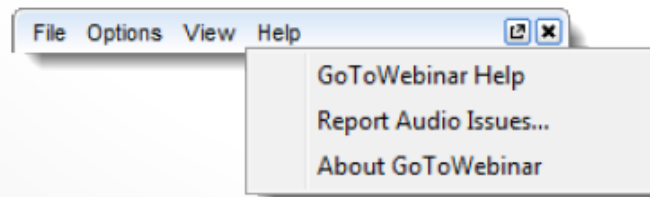
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- DIR will provide a **Continuing Professional Education (CPE)** form that documents IRM credit and generic contact hours.

  o Many use this towards various certifications/licenses or as proof-of-attendance for employer in tracking professional development.

- Everyone will receive a **follow-up email** with any information promised, the CPE form, and a link to an online survey.

Agenda

- Introduction
- DIR Events and Discussion Lists
- Core Discussion Topics:
    - Announcement: YouTube Training Videos
    - Tips for completing the Monitoring Report
    - How QAT uses the information submitted by agencies
    - General Project Management Best Practices
    - Attributes of a good Project Manager
- Questions and Answers

Speakers

Joy Hall Bryant

Program Manager, IRM Outreach
Texas Department of Information Resources

Prakash John "P.J." Vilanilam

Statewide Project Delivery Program (Framework) Lead

Texas Department of Information Resources

Richard Corbell

Senior Analyst

Legislative Budget Board

Ralph McClendon

Information Technology Audit Manager for the

Texas State Auditor's Office

DIR Events and Discussion Lists

- Visit the **DIR Calendar of Events** to view upcoming events and access more details.

  www.dir.texas.gov >> see link in bottom right corner

- From the Calendar page, click on **Collaboration**.

  DIR hosts several discussion lists open to government personnel. Announcements of most upcoming events are emailed to all IRMs and posted on DIRTECH and DIRTRAIN.

  - DIRTECH – any government staff interested in IT issues (600+ members)

  - DIRTRAIN – those involved in coordination/delivery of training (600+ members)

  - TX-PM – those interested in project management

  - App-Dev – those involved in TASSCC SIG or interested in application development

  - ITSOURCING – announcements about DIR cooperative contracts

Webinar Will Focus On...

- Announcement: YouTube Training Videos

- Tips for completing the Monitoring Report

- How QAT uses the information submitted by agencies

- General Project Management Best Practices

- Some attributes of an effective Project Manager

Announcement: YouTube Training Videos

- [What is the Texas Project Delivery Framework?](#)

- [What is a Major Information Resources Project?](#)

- [Five Misconceptions about the Texas Project Delivery Framework](#)

- Useful for project managers who are new to the Framework and for people who want a general/high level overview of the Texas Project Delivery Framework.

Tips for Completing Monitoring Report

- See the Monitoring Report Sample Template
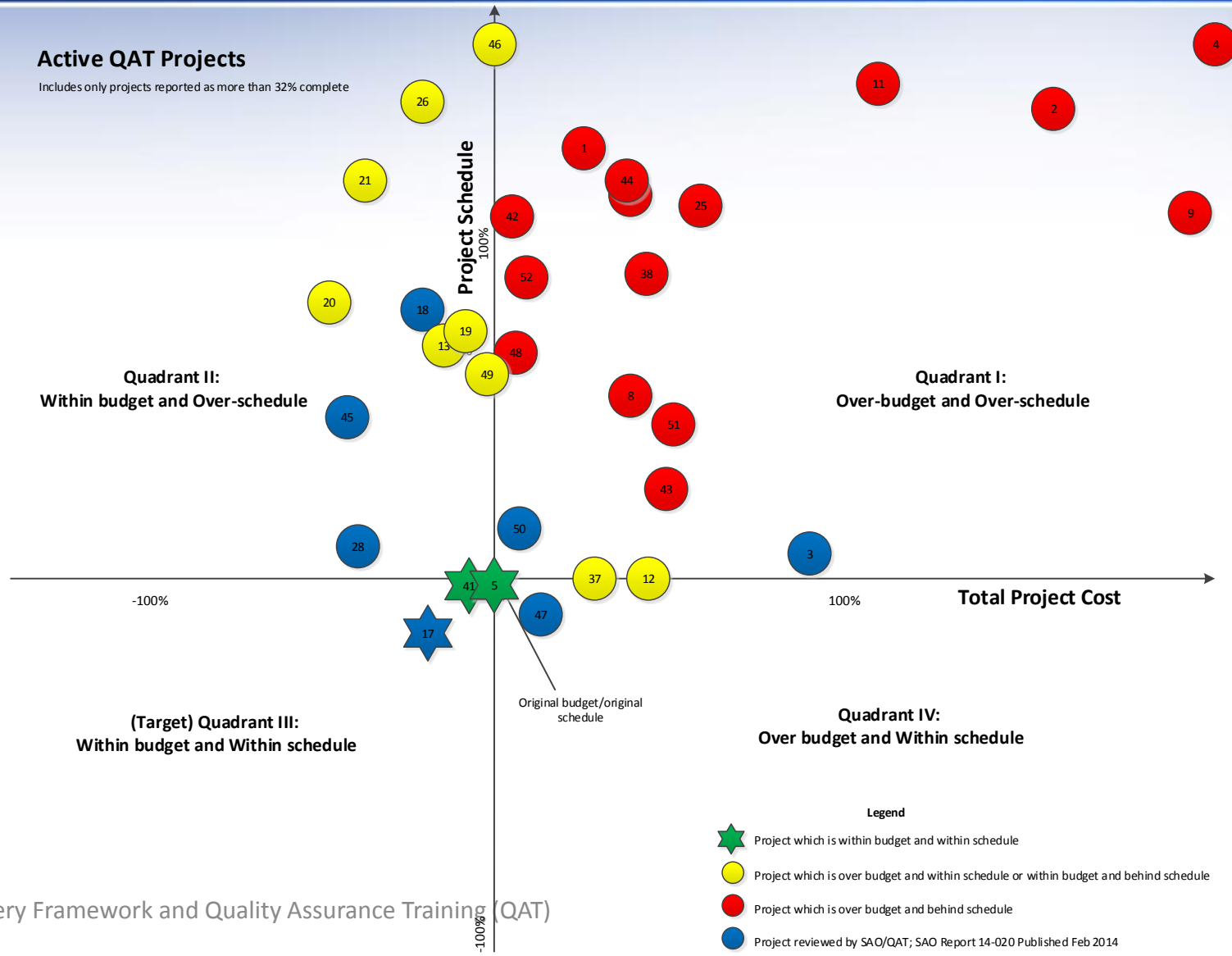
How Does QAT Use Information?

- Monitor risks on projects

Risk: The likelihood that a project will not deliver a quality solution based on commitments made to legislature when submitting the Legislative Appropriations Request (LAR). Project should meet planned:

- Timeline
- Budget
- Scope

- Prepare QAT Annual Report
  - Link to QAT Publications Website

QAT Projects:

(Graph only incudes projects which are one-third or more complete)

Active QAT Projects

Includes only projects reported as more than 32% complete

Project Schedule
100%

Quadrant II:
Within budget and Over-schedule

Quadrant I:
Over-budget and Over-schedule

-100%

100%

Total Project Cost

Original budget/original schedule

(Target) Quadrant III:
Within budget and Within schedule

Quadrant IV:
Over budget and Within schedule

-100%

Legend

- ★ Project which is within budget and within schedule
- ● Project which is over budget and within schedule or within budget and behind schedule
- ● Project which is over budget and behind schedule
- ● Project reviewed by SAO/QAT; SAO Report 14-020 Published Feb 2014

General Project Management Best Practices

- Perform high-level **requirements analyses** to understand the scope of your project.
- Ensure your project is indeed a project as defined by Texas Government Code 2054 and not a series of projects which comprise a program.
- Break your project into manageable pieces with shorter timelines.
- **Plan your project around desired business outcomes, not around funding availability (initially).**
- Use your agency's methodologies or techniques for estimating project costs and benefits.
- Use an iterative, rolling wave approach to project planning.
- Develop SMART (specific, measurable, assignable, realistic, time-bound) requirements and acceptance criteria.
- Ensure that all parties in the contract understand criteria for deliverables and system acceptance.
- **Scope, Scope, Scope! Effective change control processes.**

General Project Management Best Practices…

- Conduct Request for Information (RFI), proof of concept or pilot.
- Involve the IT, Business Line, Purchasing, and Legal departments in the acquisition planning process.
- Allow 4-6 months of lead time for DCS services.
- Use Modified Commercial-Off-The-Shelf Software, if you can.
- **<u>Clearly define (from the start) roles and responsibilities.</u>**
- Use the Framework as a resource.
- Be consistent with information across deliverables.
- **Management and stakeholder buy-in and active involvement in scope management, requirements, and testing.**
- Keep the lines of communication open with QAT.

Some Attributes of an Effective Project Manager

- Accept grey areas and be flexible.
- **Relationships are key with all stakeholders, not just sponsor.**
- Develop situational awareness (inward and outward).
- Understand that leadership is a **necessity.**
- Promote the importance of testing and requirements analysis.
- Make stakeholders aware of risks.
- Repeat the goals of the project and communicate, communicate, communicate.
- Continually learn and ask questions.
- "Don't sweat the small stuff"- act with the Big Picture in mind and prioritize.
- Strike a balance between micro-managing and not knowing what is going on.

References

Contact Information for General Questions

projectdelivery@dir.texas.gov

Quick Reference (What's Required to be Submitted to QAT?)

Framework Quick Reference Link

What is the Statewide Project Delivery Program?

Statewide Project Delivery Program Link

Where can I Find More Information about **QAT**?

Link to QAT Publications Website

Where can I find more information about **CAT**?

Link to CAT Website